VERSION 1.0

Date 16.01.2015

USING RECORD HISTORY

A USER'S GUIDE

VIENNA ADVANTAGE

This is a publication of VIENNA Advantage GmbH

Version 2015

Copyright © 2015. VIENNA Advantage GmbH All rights reserved.

This document is provided “as-is”. Information and views expressed in this document, including URL and other Internet Web site references, may change without notice. You bear the risk of using it.

Some examples depicted herein are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred.

This document does not provide you with any legal rights to any intellectual property in any VIENNA Advantage or other product. You may copy and use this document for your internal, reference purposes.

VIENNA Advantage, the VIENNA Advantage logos, and the VIENNA Advantage product and service names mentioned herein are registered trademarks or trademarks of VIENNA Advantage GmbH. or its affiliated entities.

Microsoft, Visual Studio, Windows, and Windows Server are Trademarks of the Microsoft group of companies.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

All other trademarks are property of their respective owners.

VIENNA Advantage disclaims any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose.

Use of this product is covered by a license agreement provided with the software product. If you have any questions, please email the VIENNA Advantage Customer Care listed at http://www.viennaadvantage.com/

URL and other Internet Web site references, may change without notice. You bear the risk of using it.

TABLE OF CONTENTS

1 Introduction 3

1.1 What's in this manual 3

1.2 Audience 3

1.3 Symbols and conventions 3

1.4 Product Support 3

2 History Record 4

2.1 About History Record 4

2.2 History Record 4

2.2.1 Search Records 5

2.2.2 View Attachment 6

2.2.3 Add and View Comments 6

2.3 Related History 8

2.3.1 Search Records 8

2.3.2 View Related Record Detail 9

2.4 User History 10

1 INTRODUCTION

1.1 WHAT'S IN THIS MANUAL

This Document intends to inform the user about use of Record History in VIENNA Advantage.

1.2 AUDIENCE

	Audience and Market
1	End Users
2	
3	
4	
5	

1.3 SYMBOLS AND CONVENTIONS

	Example
	Note
	Caution
	Recommendation
Tenant (Client)	Tenant is a terminology used to define a subset of data related to one or more organizations in a system. It is not a business entity but the name of a group which could relate to one or multiple business entities.

1.4 PRODUCT SUPPORT

In case of any questions related to this user manual you can contact VIENNA Advantage customer care located in the "Contact" section of http://www.viennaadvantage.com

2 HISTORY RECORD

2.1 ABOUT HISTORY RECORD

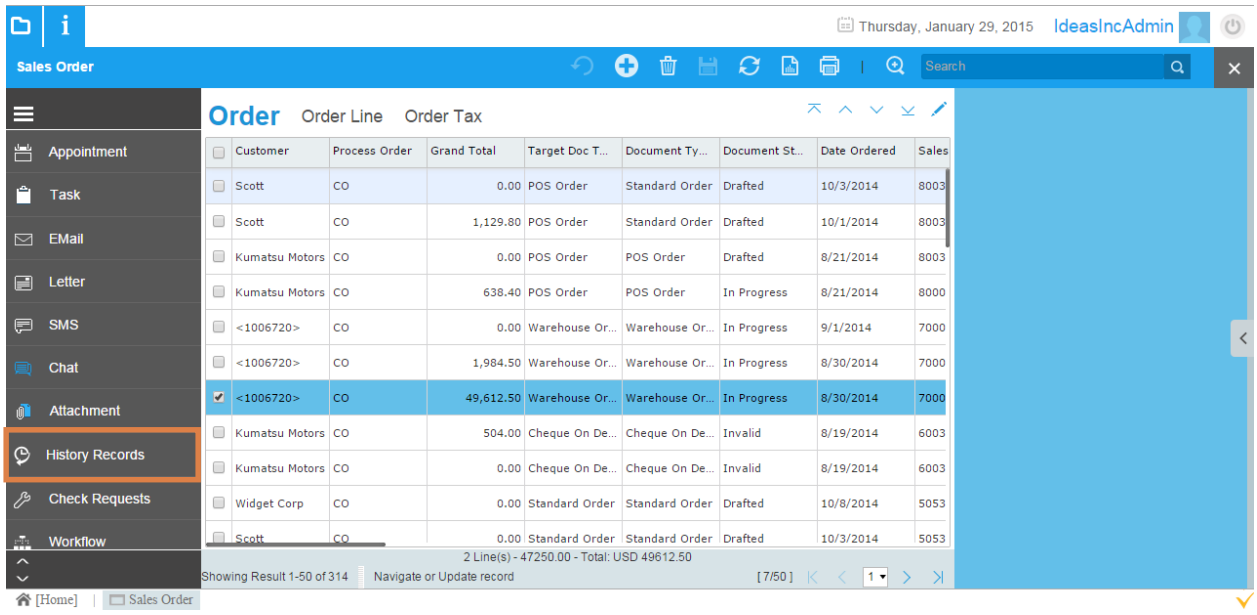
VIENNA Advantage History Record functionality provide details of all historical transactions related to Appointment, Task, Email and Letter of the selected record.

User want to see the history record of sales order, he can see the history records by selecting the Sales order from the sales order window and click on the History Record link, all the historical transactions of that particular record of Appointment, Task, Email and Letter will be displayed in the History Record window.

2.2 HISTORY RECORD

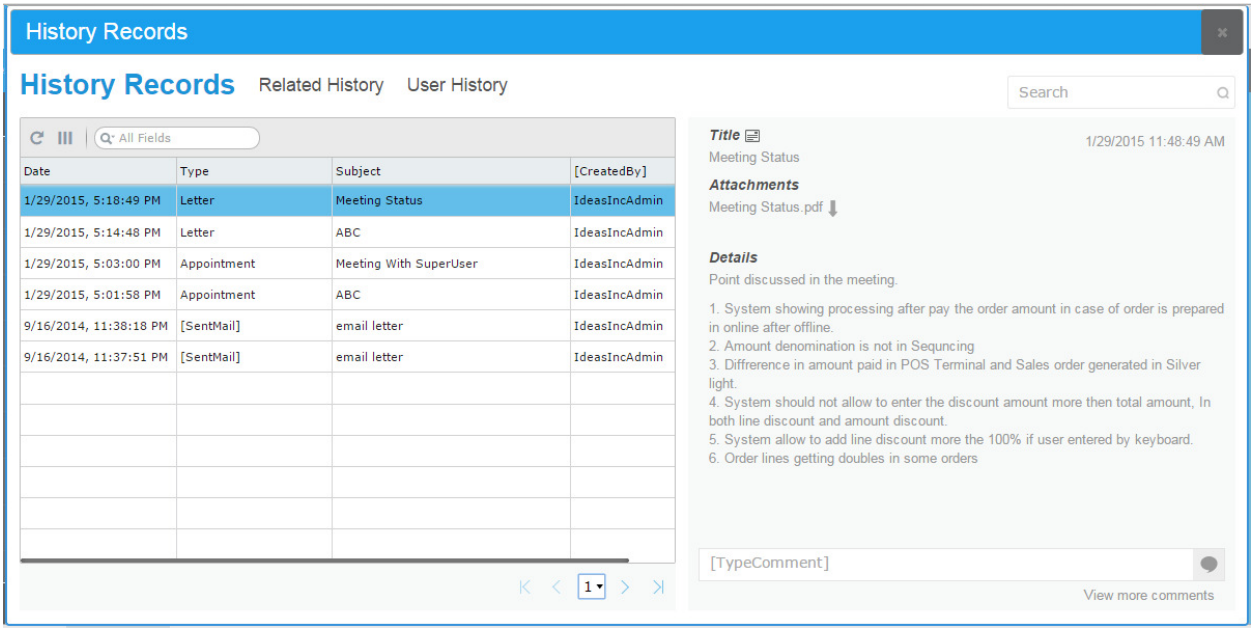
VIENNA Advantage History Record help user's to check the historical transactions appointments related to the selected record, task assigned, email sent to user for that record and any letter attached with the selected record.

Click on the History Records link.


Thursday, January 29, 2015
IdeasIncAdmin
Sales Order
Search
Order
Order Line
Order Tax
Appointment
Task
EMail
Letter
SMS
Chat
Attachment
History Records
Check Requests
Workflow
Customer
Process Order
Grand Total
Target Doc T...
Document Ty...
Document St...
Date Ordered
Sales
Scott CO 0.00 POS Order Standard Order Drafted 10/3/2014 8003
Scott CO 1,129.80 POS Order Standard Order Drafted 10/1/2014 8003
Kumatsu Motors CO 0.00 POS Order POS Order Drafted 8/21/2014 8003
Kumatsu Motors CO 638.40 POS Order POS Order In Progress 8/21/2014 8000
<1006720> CO 0.00 Warehouse Or... Warehouse Or... In Progress 9/1/2014 7000
<1006720> CO 1,984.50 Warehouse Or... Warehouse Or... In Progress 8/30/2014 7000
<1006720> CO 49,612.50 Warehouse Or... Warehouse Or... In Progress 8/30/2014 7000
Kumatsu Motors CO 504.00 Cheque On De... Cheque On De... Invalid 8/19/2014 6003
Kumatsu Motors CO 0.00 Cheque On De... Cheque On De... Invalid 8/19/2014 6003
Widget Corp CO 0.00 Standard Order Standard Order Drafted 10/8/2014 5053
Scott CO 0.00 Standard Order Standard Order Drafted 10/3/2014 5053
2 Line(s) - 47250.00 - Total: USD 49612.50
Showing Result 1-50 of 314
Navigate or Update record
[7/50]
[Home]
Sales Order

Select the record for which you want to see the history record. Click on the History Record icon highlighted in the above screen shot. After clicking on the History Record icon new window will be opened with the details of record history.

Details of History Records

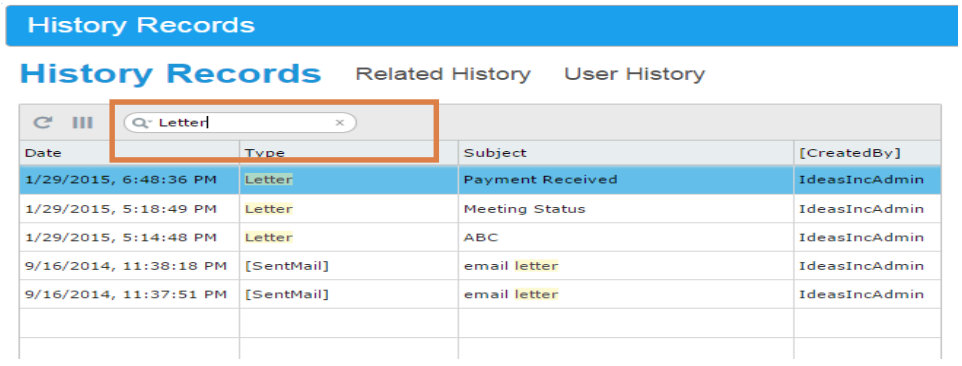


According to above attached screen shot user can view the Date, Record Type (Appointment, Email and Letter), Record Subject and User name who created the record. After clicking on any of the record the record details will be shown at the right side – Title, Description, Attachment and Comment. User can also add the comment by writing in the comment text box and click on the comment icon ( ).

2.2.1 SEARCH RECORDS

Search functionality provide the advantage to user's to search the records related to specified terms. User can search the record by entering Record date, Record type and Subject in search text box as shown in below screen shot.

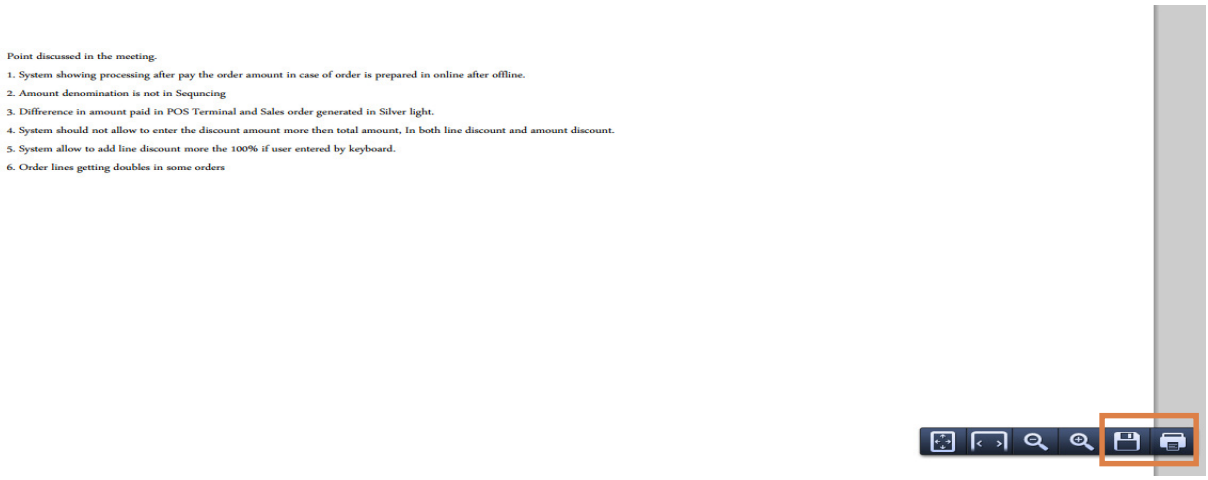
Click in the search column and enter the search value in search column



2.2.2 VIEW ATTACHMENT

Vienna Advantage History Record provide the functionality to view the attached document in the history records. Click ( ) to view the attachment. After clicking on the view icon new window will be opened with the attached record details as shown below attached screen shot.

Click on the View Attachment and Attachment details will opened in new window.

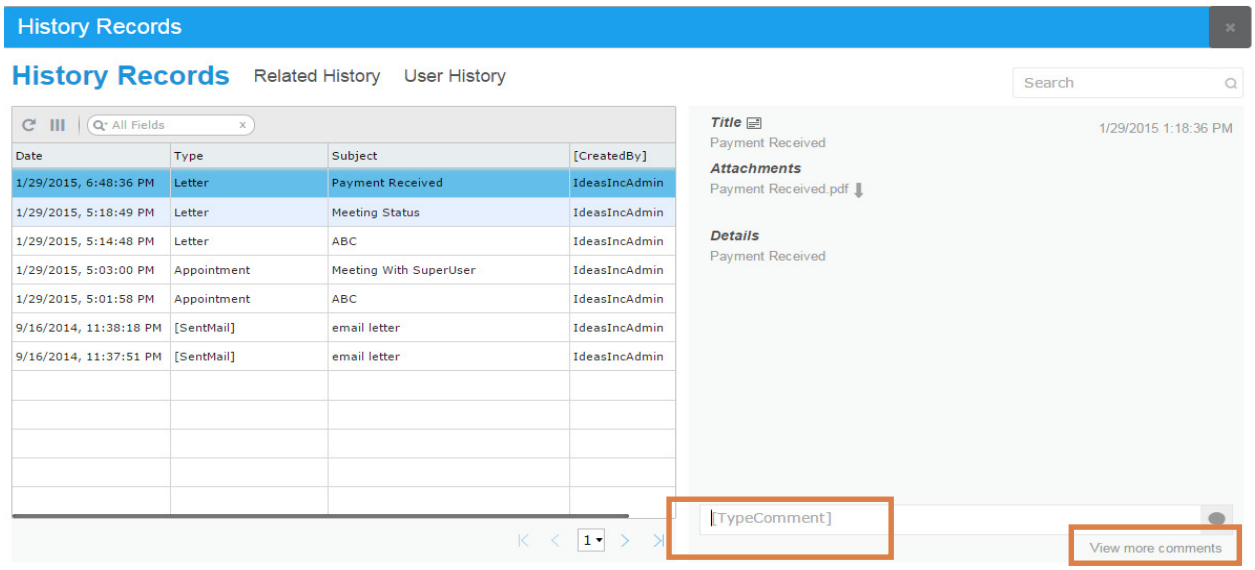

Point discussed in the meeting.
1. System showing processing after pay the order amount in case of order is prepared in online after offline.
2. Amount denomination is not in Sequncing
3. Diffrerence in amount paid in POS Terminal and Sales order generated in Silver light.
4. System should not allow to enter the discount amount more then total amount, In both line discount and amount discount.
5. System allow to add line discount more the 100% if user entered by keyboard.
6. Order lines getting doubles in some orders

User can save the attached documents by clicking on the save icon highlighted in the above attached screen shot. User can also print the documents by clicking on the print icon.

2.2.3 ADD AND VIEW COMMENTS

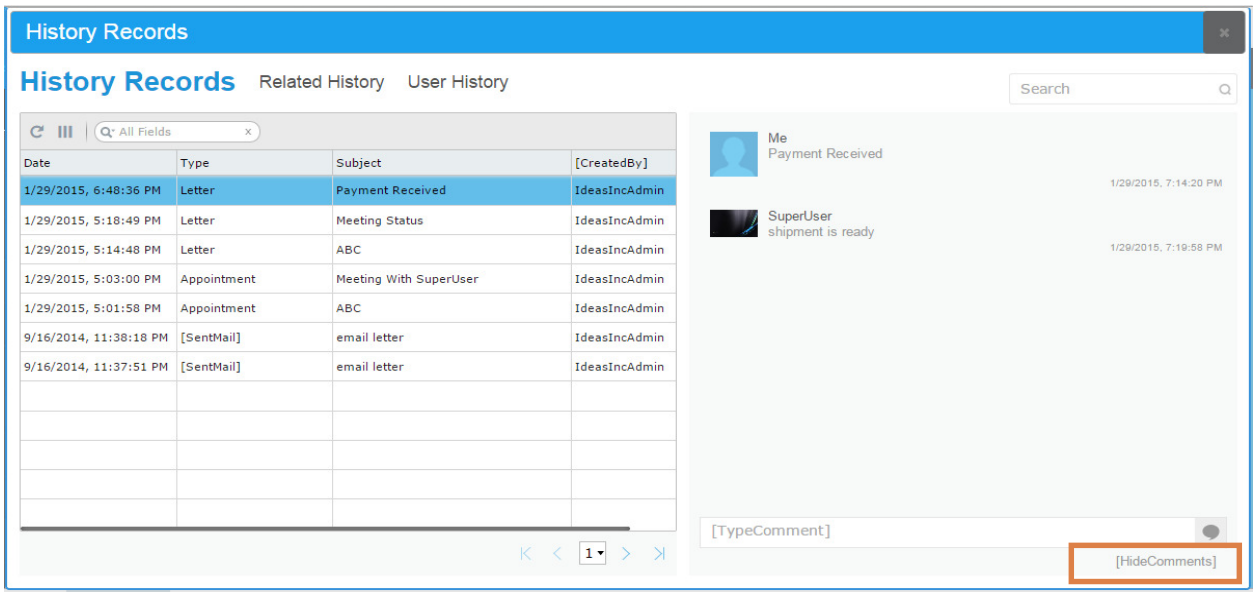
User can add new comment in the record and also view the old comments added by other user's by click on the view more comment link highlighted in the below screen shot.

Add Comment



Add the comment by entering the comment value in text box highlighted in the attached screen shot and click on the comment icon ( ).

View Comment



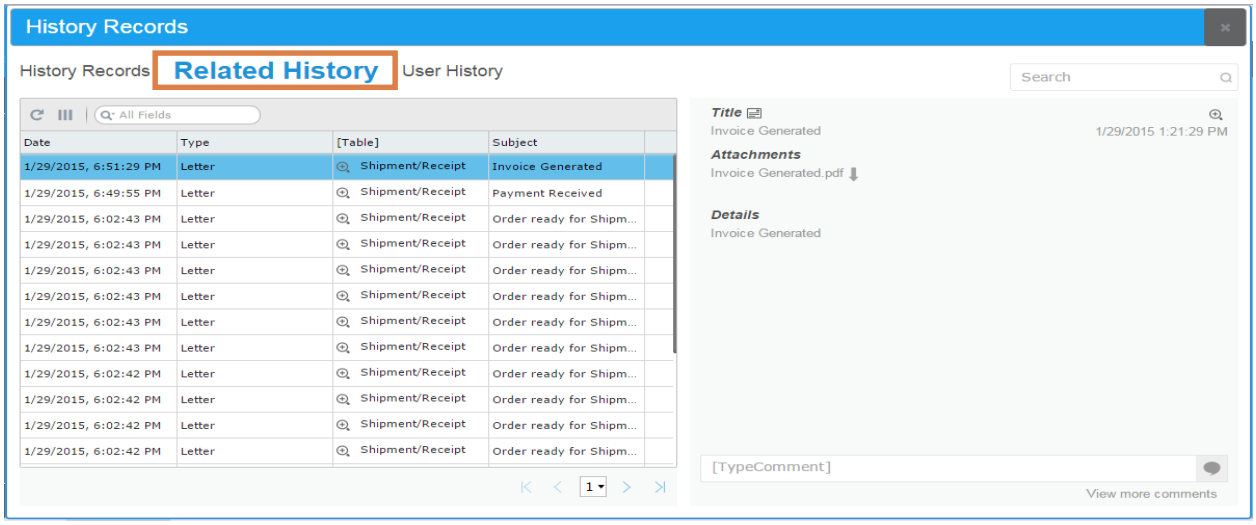
After click on the view more comment link comments added by the other user's will appears in the window as shows in the attached screen shot. User can hide the comments by clicking on the hide comment link.

2.3 RELATED HISTORY

Related History provides the details of history data of Appointment, Task, Letter and Email of the record that is related to the selected record. In the Related History system shows the history records of other records related to the selected record.

If user selects the sales order to see the history record, and the same sales order used in the shipment to customer and invoice to customer. History record of shipment to customer and invoice to customer will be displayed in the sales order related history tab.

Click on the Related History link to view the record detail.

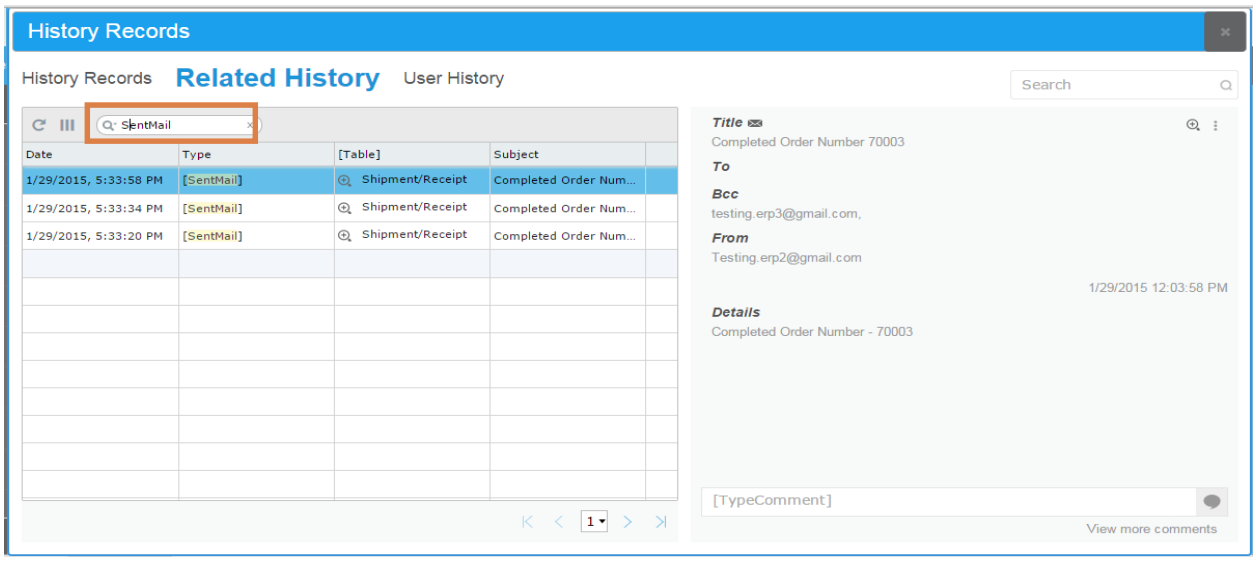


After clicking on any of the record the record details will be shown at the right side – Title, Description, Attachment and Comment. User can also add the comment by writing in the comment text box and click on the comment icon ( ).

2.3.1 SEARCH RECORDS

Search functionality provide the advantage to user's to search the records related to specified terms. User can search the record by enter the Record date, Record type and subject in search text box as per shows in the below attached screen shot.

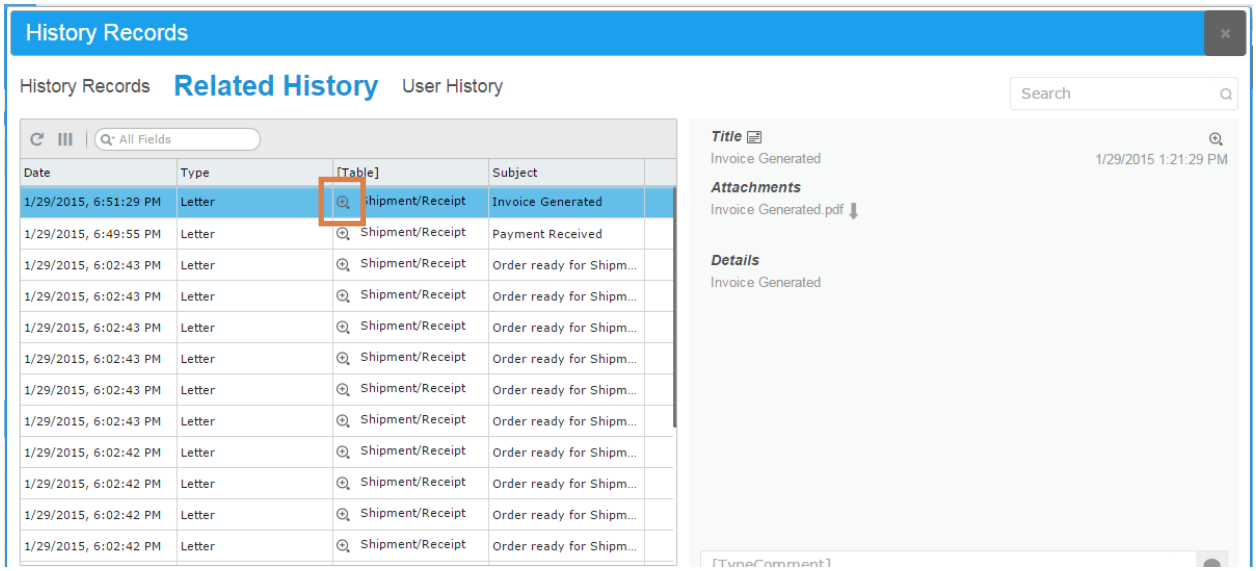
Click in the search column and enter the search value in search column



2.3.2 VIEW RELATED RECORD DETAIL

User can view the details of the related record by zoom the record. To view the related record user need to click on the zoom icon ( ) shows in the table column highlighted in the below attached screen shot.

Click on the Zoom icon to view the related record details.



After click on the zoom icon new window will be opened and system redirect the record window. User can view the record details and also view the history of that record by clicking on the history record link.

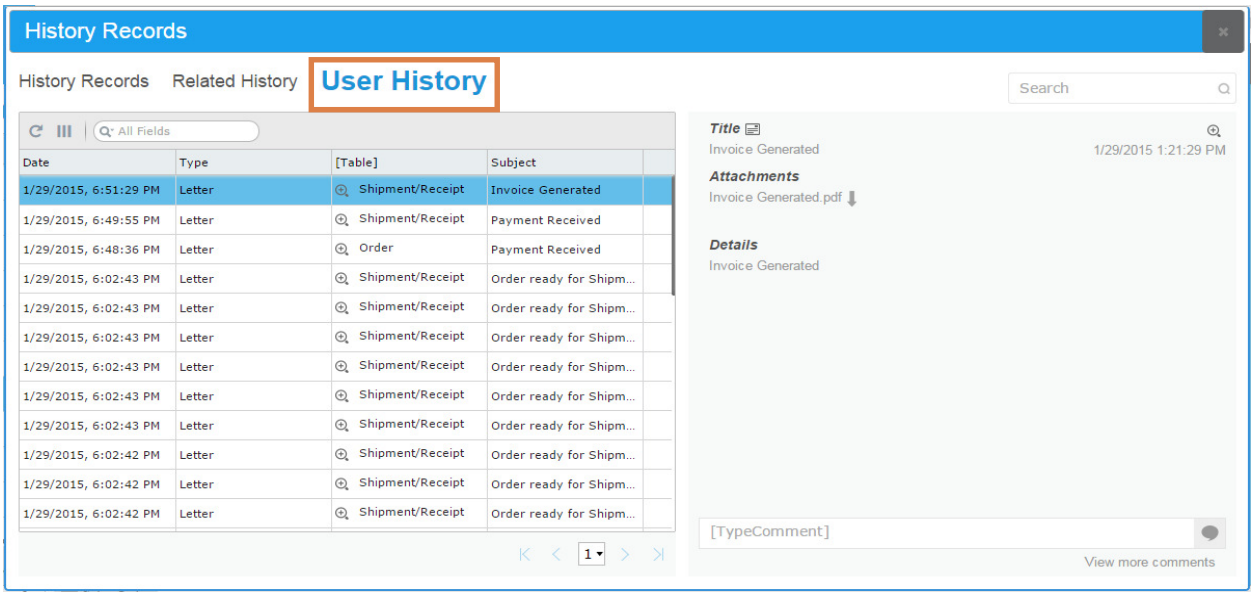
View attachment and Add/View comments functionality are working same as in History Records.

Please refer the Section number 2.2.2 (View Attachment) for View Attachment and 2.2.3 (Add and View Comments) for Add/View Comment.

2.4 USER HISTORY

User History provide the details of history records added by the logged user for Appointment, Letter, Task and Email in any record of any window. All the history of Appointment, Letter, Task and Email added by the user for any record will be displayed in the User History tab.

Click on the User History link to view the user history details.


History Records
History Records
Related History
User History
Search
All Fields
Date
Type
[Table]
Subject
1/29/2015, 6:51:29 PM Letter Shipment/Receipt Invoice Generated
1/29/2015, 6:49:55 PM Letter Shipment/Receipt Payment Received
1/29/2015, 6:48:36 PM Letter Order Payment Received
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:43 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:42 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:42 PM Letter Shipment/Receipt Order ready for Shipm...
1/29/2015, 6:02:42 PM Letter Shipment/Receipt Order ready for Shipm...
Title
Invoice Generated
1/29/2015 1:21:29 PM
Attachments
Invoice Generated.pdf
Details
Invoice Generated
[TypeComment]
View more comments

After clicking on any of the record the record details will be shown at the right side – Title, Description, Attachment and Comment. User can also add the comment by writing in the comment text box and click on the comment icon ( ).

Search Record, View record details, View attachment and Add/View comments functionality are working same as in Related History.

Please refer the section number 2.3.1(Search Records) for Search Records, 2.3.2 (View Related Record Detail) for View Record Details, 2.2.2 (View Attachment) for View Attachment and 2.2.3 (Add and View Comments) for Add/View Comment